

The Episcopal Diocese of Arizona Application for Fund B Loan



Church Name _____

Address _____

City _____

Priest in Charge _____

Email _____

Phone _____

Senior Warden _____

Email _____

Phone _____

Treasurer _____

Email _____

Phone _____

Please complete all of the requested information. If the information is unavailable, or if you need assistance in determining proper replies to the request, please email or call the Director of Finance and Operations for the Diocese, Patti Henderson via email (patti@azdiocese.org) or phone (602-254-0976).

Please send the completed application by:

- Email to patti@azdiocese.org or
- Mail to: The Episcopal Diocese of Arizona, 114 W Roosevelt, Phoenix, AZ 85003 Attention: Patti Henderson

Please include the following information with this application:

1. Current year budget
2. Copy of next year's proposed budget
3. Financial statement including balance sheet and restricted funds
4. Last audited financial statement
5. Legal description of church property

If the loan is for building maintenance, please attach a proposal for the cost of the repair. We recommend that you obtain three (3) bids before deciding on a company to perform the work. Please attach a copy of all three (3) bids for documentation purposes.

If the loan is for a capital improvement, attach a description of the proposed building, giving full details as to the purpose of the building, proposed use, estimated cost, name of architect and any other data that will assist in giving a proper understanding of your plans. Include a projection of the increase expenses.

The Episcopal Diocese of Arizona Fund B Application Form

Purpose of Loan:

Amount Requested

Length of time for payoff:

Under normal conditions, payments will be required monthly and the maximum term is ten (10) years. The Diocesan Finance Committee sets the interest rate annually.

If present surplus of income over disbursements does not cover loan repayment, please explain source of funds
